

SMARTADVOCATE ASSURESIGN INTEGRATION INSTRUCTIONS

The SmartAdvocate AssureSign Integration and AssureSign account has been configured.

Please use the SmartAdvocate AssureSign custom merge codes within the SmartAdvocate Template editor as shown below:

The screenshot shows the SmartAdvocate Template Editor interface. On the left, a document titled "CONTINGENCY FEE RETAINER AGREEMENT" is displayed. It contains several merge codes, including "<[FIRM-NAME]>", "<[PL-NAME]> <[Client]> and <[FIRM-NAME]>", and "<[CMC-ASSURE-SIGN-DATE-THE-DATE]>". A red box highlights the "<[CMC-ASSURE-SIGN-DATE-THE-DATE]>" code. On the right, a dialog box titled "Insert Merge Code(s)" is open. It has three tabs: "Regular Merge Codes", "Custom Merge Codes", and "Dynamic Merge Codes". The "Custom Merge Codes" tab is selected, and a table of custom merge codes is displayed. The table has two columns: "Merge Code" and "Description". The codes listed are:

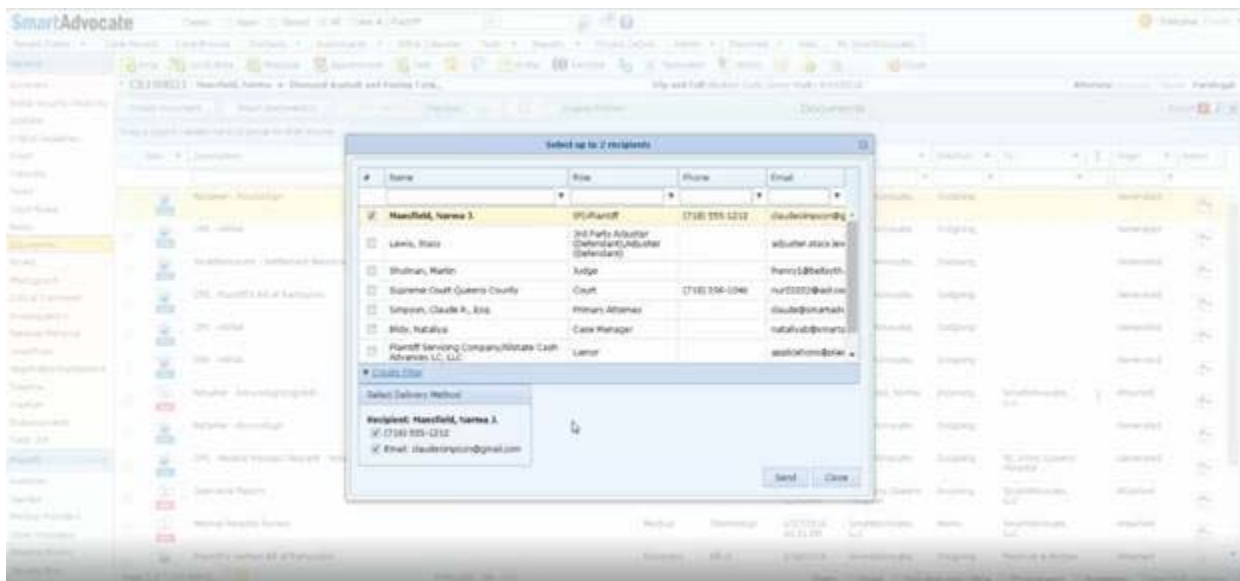
Merge Code	Description
CMC-ASSURE-SIGN	ASSURE SIGN
CMC-ASSURE-SIGN-DATE	ASSURE SIGN DATE
CMC-ASSURE-SIGN-DATE-THE-DATE	ASSURE SIGN DATE THE ___ day of ___ 20__
CMC-ASSURE-SIGN-DATE-THE-DATE2	Second ASSURE SIGN DATE THE ___ day of ___ 20__
CMC-ASSURE-SIGN-SECOND	ASSURE SIGN SECOND

At the bottom of the dialog box, there is a checkbox labeled "Contains Merge Code(s)" which is checked. Below the checkbox are two buttons: "Insert Selected Merge Code" and "Insert Selected Merge Code and Hide Dialog".

After you generate your document, you can right click the document and select "Send for e-Signature"

The screenshot shows the SmartAdvocate Documents window. It displays a list of documents with columns for Name, Date, From, Direction, To, Design, and Action. A right-click context menu is open over one of the documents, showing options such as "Open", "Copy", "Copy as PDF", "PDF Properties", "Email Link", "Download (original)", "Download", "Upload", "Send to Folder...", "Share in Client Portal", and "Send for e-Signature". The "Send for e-Signature" option is highlighted.

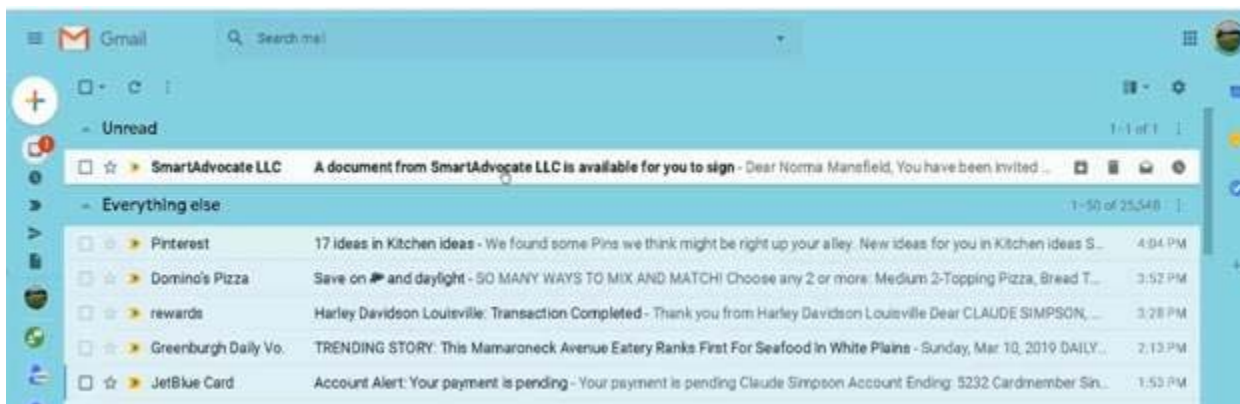
You are able to choose sending your document via text or email.

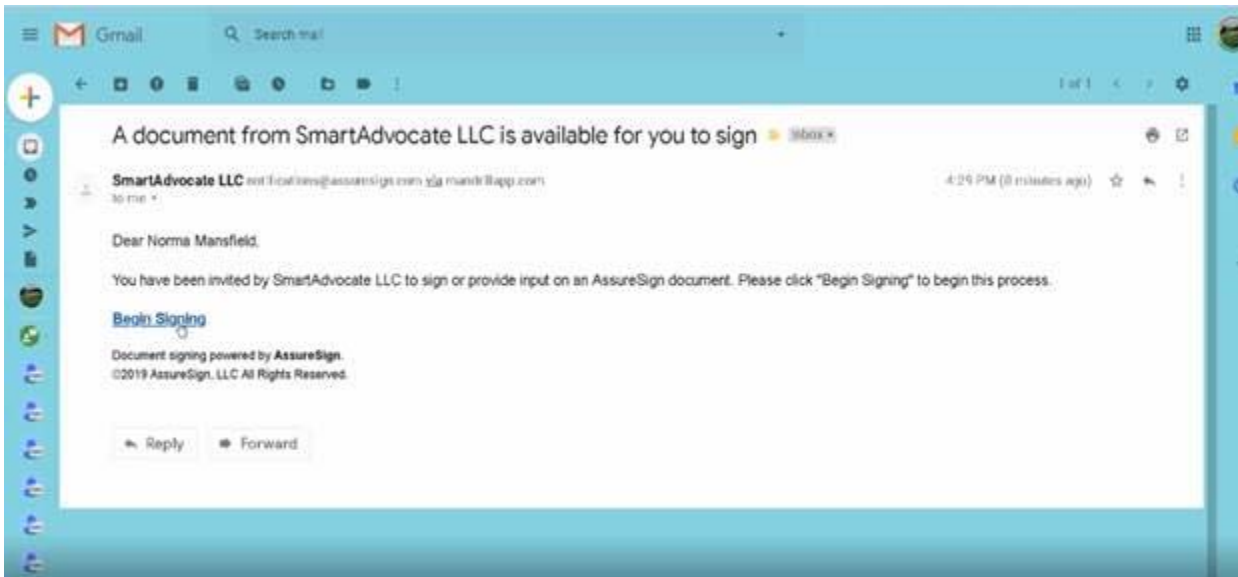


You will receive a notification via email that the document has been sent to your client.



Your client will receive either a text message or an email. Your client will open the email and click on Begin Signing.





They will follow the 5 steps on AssureSign:

1. Once you receive our email via **ASSURESIGN**, please click the **BEGIN SIGNING** link in the e-mail that states "A document from Craig Swapp & Associates is available for you to sign."
2. This will open the **ASSURESIGN** program which will allow you to complete the document. On the welcome page, you will need to click on **CONTINUE**.
3. This will take you to the "Agree to Terms" page. Please check **I HAVE READ AND AGREE TO THE TERMS AND CONDITIONS** checkbox and click **START SIGNING**.
4. You can choose the signature format of either Typed with a keyboard or drawn with touch, mouse or stylus. Once you have completed your signature on this page click on **ADOPT SIGNATURE**. Click **APPLY SIGNATURE** to preview your signature on our documents. You can edit your signature if you wish.
5. Lastly, click **FINISH** button to complete your packet. You will have a chance to download the documents for your records.

Once your client has finished signing, your office will receive a notification email and your document will appear on the documents page as a PDF and the description will have (signed) added.



